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ABSTRACT

This self-study and evaluation guide on orientation and mobility services is one of 28 guides designed for organizations undertaking a self-study as part of the process for accreditation from the National Accreditation Council (NAC) for agencies serving the blind and visually handicapped. Provided are lists of standards to be appraised by the self-evaluation teams on the extent to which the organization meets the standards (excellent, satisfactory, adequate, poor, minimal, and not applicable). Areas of standards considered are planning and structure (e.g., philosophy, purpose), personnel (e.g., qualifications, supervision), service program, (e.g., specialist-trainee ratios, application process), and evaluation (e.g., frequency, scope). Throughout the guide, space is provided for written comments to be made such as an explanation of a rating or why standard did not apply. The concluding part of the guide provides six questions designed to permit the agency to describe its program for evaluation and indicate plans for improvement of its services. (Other accreditation guides are available--see note.) (JH)

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SELF-STUDY AND EVALUATION GUIDE | 1977 Edition

Orientation and Mobility Services

NATIONAL ACCREDITATION COUNCIL
For Agencies Serving the Blind and Visually Handicapped
79 Madison Ave.
New York, N.Y. 10016

CE 019 450

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

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INSTRUCTIONS

PRELIMINARY STEPS. Two steps should precede the use of this section in a self-study.

1. All persons involved in the self-study should become familiar with *Section A, Manual of Procedures* for an understanding of the background and purposes of accreditation and the procedures to be followed in conducting a self-study using the various self-study and evaluation guides published by the National Accreditation Council.

2. Members of the self-study committee assigned to complete this guide should review the organization's statement of philosophy of service as a basic reference to be used throughout the self-study.

RATING. In the parentheses ( ) preceding each standard insert the letter representing the consensus reached in the self-study. It is unlikely that all standards are met to an excellent or even satisfactory extent, especially when initially considered by the self-study committee. Stimulated by a particular standard or several standards, it is often possible for needed improvements to be implemented without difficulty during the course of the self-study. In any event, the particular ratings selected should be those which represent, in the opinion of the self-study committee, conditions at the conclusion of the self-study.

E - Excellent. The standard is met fully or exceeded.

S - Satisfactory. The standard is met to a substantial extent.

A - Adequate. The standard is met fairly well but some improvements could be made.

P - Poor. The standard is met only partially and improvements are desirable.

M - Minimal. The standard is met to a small extent or not at all and significant improvements definitely are needed.

NA - Not Applicable. The standard does not apply for reasons outlined under *Comments.*

COMMENTS. Throughout the section, space is provided after groups of standards for written comments. An explanation of the rating or any important feature or characteristic of the program can be noted here. Also, the reason why a particular standard or group of standards is not felt to apply to the organization can be outlined.

PROGRAMMING FOR IMPROVEMENT. This concluding part of the guide contains seven questions which provide an opportunity to list the outstanding features of the program and how it benefits the persons served. The questions also call for a listing of past improvements and those which are yet to be accomplished. Plans for improvement initiated as a result of the self-study should be included.

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SELF-STUDY AND EVALUATION GUIDES

This self-study and evaluation guide is designed to be used in combination with other guides, listed below, available from the National Accreditation Council. An organization undertaking a self-study in applying for accreditation needs to use the following: *A*, either *B-1* or *B-2*, all *C* sections, those *D* sections for the services provided, an *E* form for certain staff members and *F*.

Section	Title
A	*Manual of Procedures*
B-1	*Agency Profile*
B-2	*School Profile*
C-1	*Function and Structure*
C-2	*Accounting for Services and Finances*
C-3	*Personnel Administration and Volunteer Service*
C-4	*Physical Facilities*
C-5	*Public Relations and Fund Raising*
D-2A	*Orientation and Mobility Services*
D-2B	*Orientation and Mobility Services (Dog Guide Programs Only)*
D-3	*Rehabilitation Centers*
D-4	*Workshop Services*
D-5	*Social Services*
D-6	*Vocational Services*
D-7	*Production of Reading Materials*
D-8	*Rehabilitation Teaching Services*
D-15	*Preschool Services (from Birth to Age 6)*
D-16	*Other Service Program*
D-20	*Curriculum Planning and Evaluation*
D-21	*Program for Multihandicapped Students*
D-22	*Program for K-12 Students*
D-23	*Program for Independent Living*
D-24	*Educational Resources Program*
D-25	*Leisure Education*
D-26	*Residential Living Program*
D-27	*Health Services*
D-28	*Educational Diagnostic and Counseling Services*
E	*Individual Staff Member Information Form*
F	*Evaluation Summary and Report (Program for Major Improvements)*

Sections *D-2A* through *D-8* are applicable primarily to "agencies" and *D-20* through *D-28* to "schools." *D-15* is used for preschool services in any setting. Similarly, *D-16* is used by both agencies and schools for services for which NAC does not have specific program standards such as radio reading service or special summer program.

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ACKNOWLEDGMENTS

Revision of the standards for qualifications of orientation and mobility specialists was made possible by the active participation of a number of individuals. Dr. Richard E. Hoover and his associates on the national technical committee which prepared the revisions are due a substantial amount of credit for the content of the revisions.

The committee was assisted by suggestions and comments from a wide variety of individuals who contributed their thinking during various stages of the revision process. A special note of appreciation goes to the American Association of Workers for the Blind, and particularly to its orientation and mobility certification and executive committees, which gave careful and detailed consideration to the impact of these revisions upon the field of services for the blind and visually handicapped. It is impossible to acknowledge individually the numerous and valuable suggestions received from a substantial number of accredited and other organizations, professional preparation programs, administrators, consumers and others.

Responsibility for the content and format of this publication was vested by NAC's Board of Directors in the Commission on Standards chaired by Mrs. Helen W. Worden. The members of the Commission, including Mr. Donald Wedewer who served on the revision committee itself, contributed from their wide experience and broad perspective to the final product.

ORIENTATION AND MOBILITY SERVICES

INTRODUCTION

The standards for Orientation and Mobility Services were developed originally by the ad hoc Commission on Standards and Accreditation of Services for the Blind and published in 1966 in *THE COMSTAC REPORT, Standards for Strengthened Services*. These standards subsequently were incorporated into three sections of the self-study and evaluation guides published by the National Accreditation Council (NAC) for use in its accreditation program for (a) agencies, (b) rehabilitation centers, and (c) schools serving blind and visually handicapped persons.

In 1976, a technical committee appointed by the Commission on Standards concluded a review, begun in 1975, of the standards for qualifications of orientation and mobility specialists (peripatologists) engaged in cane programs. The standards applying to dog guide programs and other aspects of orientation and mobility were not included in the review.[1]

At the same time the standards were developed, the avenues available to agencies and schools for recruiting knowledgeable teachers in this specialty included training programs undertaken by some local, direct service agencies as well as graduate level training programs conducted under university auspices.

The standards, from the beginning, recognized the advantages offered by the university-based professional preparation programs. In the years since the standards were published, significant expansion of these programs has taken place. Presently, both undergraduate and graduate programs are able to supply orientation and mobility specialists in sufficient numbers to meet the needs of agencies and schools for qualified personnel.[2]

THE COMSTAC REPORT proposed the development of a program for national certification of teachers of orientation and mobility. This need currently is being met by the certification program established by the American Association of Workers for the Blind. In 1975, the Association for Education of the

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[1]Dog guide schools should continue to use the 1968 edition of this self-study instrument which has been renamed *Section D-2B, Orientation and Mobility Services (Dog Guide Programs Only)*.

[2]It is recognized, however, that no national accreditation program has been established to give public assurance of the quality of these university-based programs.

Visually Handicapped authorized an official liaison with the AAWB certification committee in orientation and mobility.

This development of a responsibly administered certification program which is national in scope, is of considerable significance and was one factor that precipitated this revision of NAC's standards for teacher qualifications. Thus, these standards generally have been brought into conformity with the certification criteria, and AAWB certification has been included as one means of determining competency in the teaching of orientation and mobility.

NAC also was aware of questions which had been raised about the vision qualifications. The review of this standard affirmed the need for an orientation and mobility specialist to be able to see well enough to instruct, evaluate and protect the trainee (i.e., 20/40 acuity and 120° field).[3]

In general, such specialists should be able to observe trainee actions and reactions and to visually detect from a distance of 500 feet, dangerous situations and objects. The committee has concluded, however, that a 20/20 vision standard is unduly restrictive and has revised the standard so that it is in general conformity with visual criteria required for operating motor vehicles.

An announcement of this revision process was made in the Spring, 1975 issue of NAC's newsletter *The Standard-Bearer*. Invitation to make comments and suggestions on the present standards was also extended to a number of individuals and organizations including selected accredited and non-accredited agencies and schools, professional groups and national consumer organizations.

Shortly thereafter, a technical committee was appointed by the Commission on Standards to evaluate the responses and to prepare a preliminary draft of revised standards.

The technical committee met to consider the comments that had been received. It then prepared a preliminary draft of revised standards for national review which was announced in the Fall, 1975 and again in the Spring, 1976 issues of *The Standard-Bearer*. Finally, the committee studied the many comments received during the national review from agencies and schools, practitioners, and consumers and others, and prepared a final report to the Commission on Standards. The Commission expresses its appreciation to the technical committee and to the many others who participated in this revision process.

In accepting the technical committee's final report, the Commission on Standards slightly modified the order and content of the standards pertaining to qualifications of orientation and mobility specialists. Also, certain additions and minor editorial changes were made to make this section comparable with other recently revised sets of standards. Deleted were a few standards covering subjects more adequately covered in *Section C-1, Function and Structure,* and in NAC's standards for educational services. Added were standards concerning planning and evaluation of services and involvement of consumers. A simplified rating system was adopted to replace that used in the 1968 edition of this publication.

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[3] Field of vision usually is measured on a standard perimeter at a distance of one third of a meter using a white object six millimeters in diameter.

It should be noted that the Commission did not undertake any revision of standards concerning dog guide programs. The use of two separate sections of the *Self-Study and Evaluation Guide* was authorized: *Section D-2A, Orientation and Mobility Services*, and *Section D-2B, Orientation and Mobility Services (Dog Guide Programs Only)*.

The separate publication of this document, *Section D-2A*, was authorized by the Commission on Standards in November, 1976.

THE STANDARDS

1. PLANNING AND STRUCTURE

( ) 1.1 PHILOSOPHY. The organization's orientation and mobility services are consistent with its statement of philosophy of service and program objectives as approved by its governing authority.

Comments:

( ) 1.2 PURPOSE. The orientation and mobility services program is designed to provide instruction in the use of aids, methods and skills which enable blind and visually handicapped persons to move from one place to another with confidence, safety and purpose.

Comments:

( ) 1.3 PERSONS SERVED. The organization identifies a population or populations eligible for its orientation and mobility services.

( ) 1.3.1 Youths, elderly persons and severely disabled people who are blind or otherwise visually handicapped are given priority for service.

Comments:

( ) 1.4 PLANNING. Orientation and mobility services use a planning system to establish annual program goals and objectives; the planning system includes the organization's governing authority, staff, persons served, and interested individuals and groups.

Comments:

( ) 1.5 STRUCTURE. The organization chart and job descriptions indicate the status and location within the organization of the orientation and mobility services program, the responsibilities of personnel and their relationship to other programs and personnel within the organization.

Comments:

2. PERSONNEL

( ) 2.1 PROVISION OF ORIENTATION AND MOBILITY SERVICES. Orientation and mobility services are provided by qualified orientation and mobility specialists.

( ) 2.1.1 Role of the Specialist. Orientation and mobility specialists are the primary planners, coordinators, providers and evaluators of orientation and mobility services.

( ) 2.1.2 Trainee Participation. Trainees (and their families where appropriate) participate in all phases of the planning, provision and evaluation of individualized orientation and mobility services.

( ) 2.1.3 Sufficient Number of Specialists. The organization employs qualified staff in sufficient numbers to meet the orientation and mobility needs of the persons identified as eligible for such services.

Comments:

2.2 QUALIFICATIONS OF ORIENTATION AND MOBILITY SPECIALISTS.

Orientation and mobility specialists meet one or the other of the following qualifications (A. Certification or B. Specified Qualifications):

A. Certification

( ) 2.2.1A Possession of a valid certificate in orientation and mobility from the American Association of Workers for the Blind.

B. Specified Qualifications

( ) 2.2.1B Professional Preparation Graduation from an undergraduate or graduate program in orientation and mobility from an accredited college or university.

( ) 2.2.2B Physical Characteristics General physical characteristics that permit the orientation and mobility specialist to protect the trainee from dangers of irregular terrain, moving traffic, varying architectural structures, heavily traveled walkways and other travel situations and to observe and evaluate trainee progress.

A. Certification

(See preceding page.)

B. Specified Qualifications

( ) 2.2.2.1B At least 20/40 visual acuity in the better eye with best correction, a contiguous field of vision of at least 120° with best correction, and no evidence of pathology which would alter this acuity and/or field to a significant extent.

( ) 2.2.2.2B Hearing within normal limits as generally recognized by audiologists (bilateral pure tone hearing threshold averages to within 25 db HTL).

Comments:

( ) 2.3 MEDICAL EXAMINATIONS OF ORIENTATION AND MOBILITY SPECIALISTS. Current ophthalmological, otological and general physical examination reports are obtained at the time of employment and thereafter as provided by the organization's personnel policies.

Comments:

( ) 2.4 CLASSIFICATION OF ORIENTATION AND MOBILITY SPECIALISTS. Orientation and mobility specialists generally are employed within an organization at two levels which approximate the following responsibilities:

( ) 2.4.1 Level I. The *orientation and mobility specialist* assumes primary responsibility for a range of orientation and mobility services such as the orientation and mobility evaluation, development of the trainee's plan of instruction including sequential lessons and objectives, the provision of planned travel and sensory training, follow-up and evaluation of individualized services.

( ) 2.4.2 Level II. The *senior orientation and mobility specialist* assumes primary responsibility for providing trainees the full range of orientation and mobility services; such specialists may be assigned

additional related functions such as program planning and evaluation, and supervision of other orientation and mobility specialists and services.

Comments:

( ) 2.5 SUPERVISION. An agency or school which employs at least two orientation and mobility specialists assigns to a senior orientation and mobility specialist the supervisory responsibility for the service.

Comments:

( ) 2.6 OTHER PERSONNEL. In addition to one or more qualified orientation and mobility specialists, the staff includes one or more persons from the counseling professions, a medical consultant and such other personnel as may be required by trainee needs, setting, etc.

( ) 2.6.1 Role of Other Specialists. Other appropriate specialists assist the orientation and mobility specialist.

( ) 2.6.2 Consistent Training Environment. All personnel, paid and unpaid, having direct contact with trainees are expected to know and use proper, basic techniques (such as use of a sighted guide and protective use of hands) in order to provide a consistent environment in which trainees can practice and improve orientation and mobility skills.

( ) 2.6.3 In-Service Training. The orientation and mobility staff provides periodic in-service training in proper, basic techniques of orientation and mobility to all personnel having direct contact with trainees.

Comments:

3. SERVICE PROGRAM

( ) 3.1 SPECIALIST-TRAINEE RATIOS. An orientation and mobility specialist is assigned that number of trainees which experience indicates the specialist can teach effectively.

( ) 3.1.1 Daily Teaching Load. The orientation and mobility specialist is scheduled for not more than six hours of teaching each day.

( ) 3.1.2 Active Travel Teaching. All active travel teaching takes place with one orientation and mobility specialist working with one trainee. (Active travel teaching is defined as teaching in those situations in which the trainee requires the specialist's undisturbed and individual attention for effectiveness of instruction and minimization of hazards and confusion.)

( ) 3.1.3 Contributory Instruction. Contributory orientation and mobility instruction not of the active travel teaching variety may be given to trainees in groups.

Comments:

( ) 3.2 APPLICATION PROCESS. The various travel techniques are explained to each applicant who is given the opportunity to consider the possibilities most suited to the applicant's own needs and interests.

( ) 3.2.1 Application Review. Applications are carefully reviewed to assess each trainee's individual interests and needs.

( ) 3.2.2 Medical Consultation. A medical consultant is available to consult with the staff on medical information derived from a general physical examination, an ophthalmological examination, an otological examination, and any other data which may be necessary, such as in the case of diabetic applicants.

Comments:

( ) 3.3 INDIVIDUALIZED PLAN. The application process results in an individualized, written service plan, devised for and with each individual accepted for training, which is kept in the organization's records and is reviewed and revised by the staff and the trainee during the course of service.

( ) 3.3.1 Sequentiality. The plan is carefully constructed in sequential order of lessons and objectives.

( ) 3.3.2 Feedback. Throughout training, and on completion of service, each trainee is made aware of the level of skill attained in relation to travel potential and limitations.

Comments:

( ) 3.4 TRAVEL TECHNIQUES. Instruction is offered in as many of the following travel techniques as are appropriate for the individual trainee's needs, abilities and interests (check those which are regularly offered):

_____ Use of sighted guide;

_____ Protective use of hands, arms and other body movement;

_____ Grip and use of cane in cross body and touch techniques;

_____ Principles of orientation indoors and outdoors; how to obtain and use reference data through remaining senses;

_____ Locating, ascending and descending stairs;

_____ Methods of maintaining straight line walking;

_____ Location of intersections, with and without curbs;

_____ Judging traffic sounds, pattern and movement;

_____ Crossing streets;

_____ Intersection patterns;

_____ Use of common modes of transportation;

_____ Contacting and, when necessary, tactually identifying objects, including overhead obstructions;

_____ Proper use of cane in crowded areas with due regard for other people;

_____ Getting from unknown to known points, through drop-offs, etc.;

_____ Environmental and seasonal variables;

_____ Use of low vision aids and residual vision under varying conditions.

Comments:

( ) 3.5 OTHER INSTRUCTION. In addition to instruction in active travel techniques, individual or group instruction is made available to develop other skills.

( ) 3.5.1 Sensory Training. Appropriate training is offered in use of the following senses (check those which are regularly included):

_____ Visual (including use of low vision aids);

_____ Auditory (identification and localization of sounds);

_____ Olfactory (identification of odors);

_____ Tactual (discrimination by touch);

_____ Kinesthetic (muscle memory, judging distance, etc.).

( ) 3.5.2 Data Organization. Appropriate training is offered in organization of sensory data for purposes of orientation in constant or changing environments and includes visualization and spatial relations.

( ) 3.5.3 Other Mobility Aids. The course includes information regarding other mobility aids (check those regularly included):

_____ Dog guides - their history, potential for certain types of blind persons, etc.;

_____ Low vision aids for those with residual vision;

_____ Electronic, ultrasonic and other technological aids which are available for personal use or are undergoing experimentation and development.

( ) 3.5.4 Exercises. The course plan includes miscellaneous exercises relating to physical fitness, posture, breathing, coordination and balance.

Comments:

( ) 3.6 COURSE TIME ALLOTMENTS. The course plan allows for flexible time allotments and progress rates to suit individual needs and abilities.

Comments:

( ) 3.7 MAINTENANCE OF RECORDS. Individual service records contain information gathered at time of application, reports of trainee's progress, a record of daily activities and an evaluation of the trainee's travel ability on completion of the course.

Comments:

( ) 3.8 FOLLOW UP. The organization conducts systematic follow up to keep in touch with those who have completed orientation and mobility training to assess individual needs for additional instruction and for purposes of program evaluation of the orientation and mobility services.

( ) 3.8.1 Further Service. The organization is prepared to provide additional orientation and mobility services when requested by former trainees.

Comments:

4. EVALUATION

( ) 4.1 PURPOSE OF EVALUATION. The orientation and mobility service has an evaluation system to measure results in accomplishing its goals and priorities consistent with the organization's statement of philosophy, the objectives of its orientation and mobility services program and the individualized, written service plans and objectives of each trainee.

Comments:

( ) 4.2 SCOPE OF EVALUATION. Program evaluation is an ongoing part of the orientation and mobility services encompassing planning, service delivery and assessment of results.

Comments:

( ) 4.3 PARTICIPATION IN EVALUATION. Broad input is sought in the evaluation from trainees and their families, organizations of blind or otherwise visually handicapped persons, orientation and mobility specialists and supervisors, other staff, volunteers, the chief administrator, members of the governing authority and interested individuals and community groups.

Comments:

( ) 4.4 FREQUENCY OF EVALUATION. Evaluations are conducted and reported in writing on a regularly scheduled basis, summarized in the organization's annual report to the public and become an integral part of the organization's management information system.

Comments:

PROGRAMMING FOR IMPROVEMENT

It is desirable for an organization to develop plans for improving orientation and mobility services. Such planning usually flows from the ongoing evaluation in a continuous cycle of planning, implementation and assessment. The strengths and weaknesses uncovered through the self-study and evaluation process can assist in the development of a timetable for effecting further improvements. Participants in the planning include the governing authority, staff, persons served, as well as interested public and community groups and concerned citizens.

The following six questions are designed to permit the agency to describe its program for evaluation and improvement of these services. The questions are also designed to help the Commission on Accreditation evaluate the services in terms of one of the Commission's governing principles: "If deficiencies exist, the organization is willing to remedy them, and gives evidence of being capable of effecting the needed remedies within a reasonable period of time."

It should be borne in mind that the principles of evaluation and planning for improvement apply equally to weaker as well as stronger aspects of orientation and mobility services. The questions that follow should be answered by indicating both: (a) specific plans for improvement where the standards presently are not met; and (b) further improvements planned where the standards presently are met.

1. What improvements were made in the last fiscal year?

2. What improvements are under way in the present fiscal year?

3. What improvements are definitely planned for the next fiscal year?

4. What improvements are contemplated in the long-range plan?

5. How are these improvements related to the ongoing planning and evaluation process of the organization?

6. What are the overall results of the orientation and mobility services in relation to the persons served?

MEMBERS OF SELF-STUDY COMMITTEE

Committee Chairman _____

Members:

Name	Identification (staff job title, Board member, consumer, etc.)
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Date Completed _____ Date accepted by Coordinating Committee _____

Organization Name _____

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